

Benchmark Measurements of Tourism Development in Charleston and Peer Cities

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November 6, 2014

Acknowledgements: The Office of Tourism Analysis would like to thank Yvonne Fortenberry, Amy Southerland, and Tim Keane in the City of Charleston, Cindy Landolt and Delamar Turner in the City of Savannah, Mishawn Cook from the City of Boulder, Chris Lundgren and Michelle Holman from the City of Aspen, Perrin Lawson in the Charleston Area Convention and Visitors Bureau, and Christopher Flowers in the College of Charleston, for their tremendous help in this study.

Introduction

The City of Charleston is in the process of conducting the third round of tourism planning. The original tourism management plan was developed in 1978, with a follow-up study in 1994 and an update in 1998. Much debate revolves around the stages of tourism development. In order to compare Charleston's level of tourism development with similar historic cities, the City has contracted the Office of Tourism Analysis to benchmark Charleston against a pre-selected list of cities.

Methodology

The tourism management planning committee held several discussion sessions in the spring of 2014. The Office worked with the Department of Planning, Preservation, and Sustainability and generated a list of 14 peer cities of Charleston. This includes six cities in the United States, and eight cities from Europe, Canada, and the Caribbean. We compared the levels of tourism development in both the downtown and the municipality areas. The indices for both types of areas included hotel density, hotel room density, restaurant density, hotels per capita, hotel rooms per capita, restaurants per capita, and number of visitors per capita.

We obtained the data with the following methods:

1. The definition of downtown areas in various cities was determined by searching through local government or tourism bureau's websites and consulting with the City of Charleston's Department of Planning, Preservation, and Sustainability.
2. Each downtown area in square miles was calculated through Google Map tools based on the delineation obtained from step 1.
3. The populations of each of the downtown areas and the municipalities were obtained from U.S. Census bureau and local government websites.
4. Total numbers of hotels and hotel rooms were obtained from Smith Travel Research reports.
5. The number of restaurants was obtained from various sources, firstly through each municipality's business license databases. If business license data were not available, we used data from urbanspoon.com, TripAdvisor.com, and yelp.com. The data were averaged and scaled since the websites may have contained closed restaurants or duplicated addresses. For our purposes, a "restaurant" was defined as any establishment with a permanent physical location that serves food.
6. The estimated visitor numbers were obtained from TNS Global, a commercial company.

We were unable to obtain some data through reasonable effort. For the rest, every effort was made to ensure the accuracy of the data, though 100% accuracy is not guaranteed.

List of Peer Cities and Definition of Downtown Maps

City	Country
Charleston, SC	United States
Savannah, GA	United States
Boulder, CO	United States
Aspen, CO	United States
Boston, MA	United States
New Orleans, LA	United States
San Francisco, CA	United States
Quebec City	Canada
Amsterdam	The Netherlands
Dublin	Ireland
Göteborg*	Sweden
Malaga	Spain
Salzburg	Austria
Venice	Italy
Hamilton	Bermuda

**We can't locate any data regarding downtown Göteborg, Sweden. Thus, no downtown area was defined for Göteborg.*



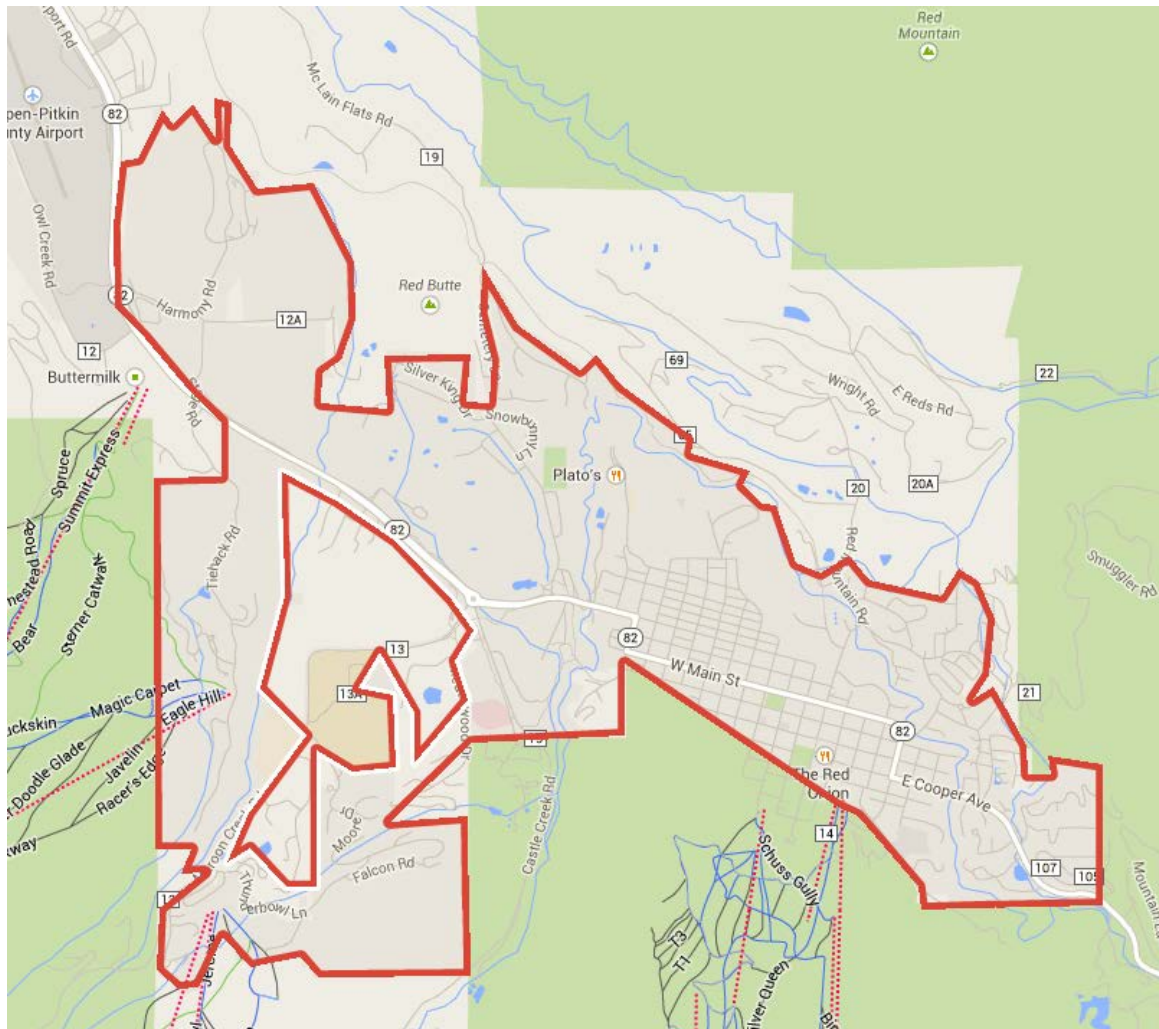
Downtown Area of Charleston, SC



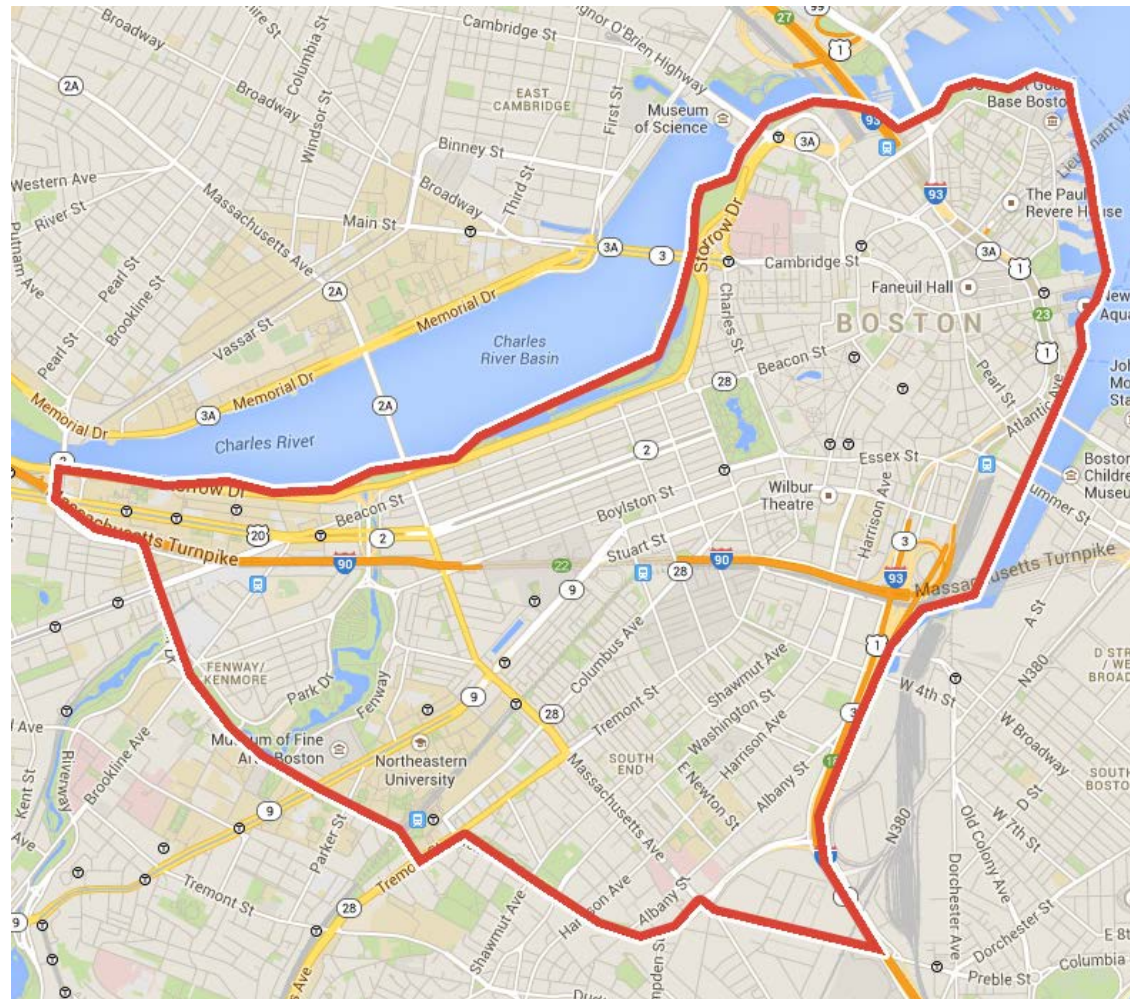
Downtown Area of Savannah, GA



Downtown Area of Boulder, CO



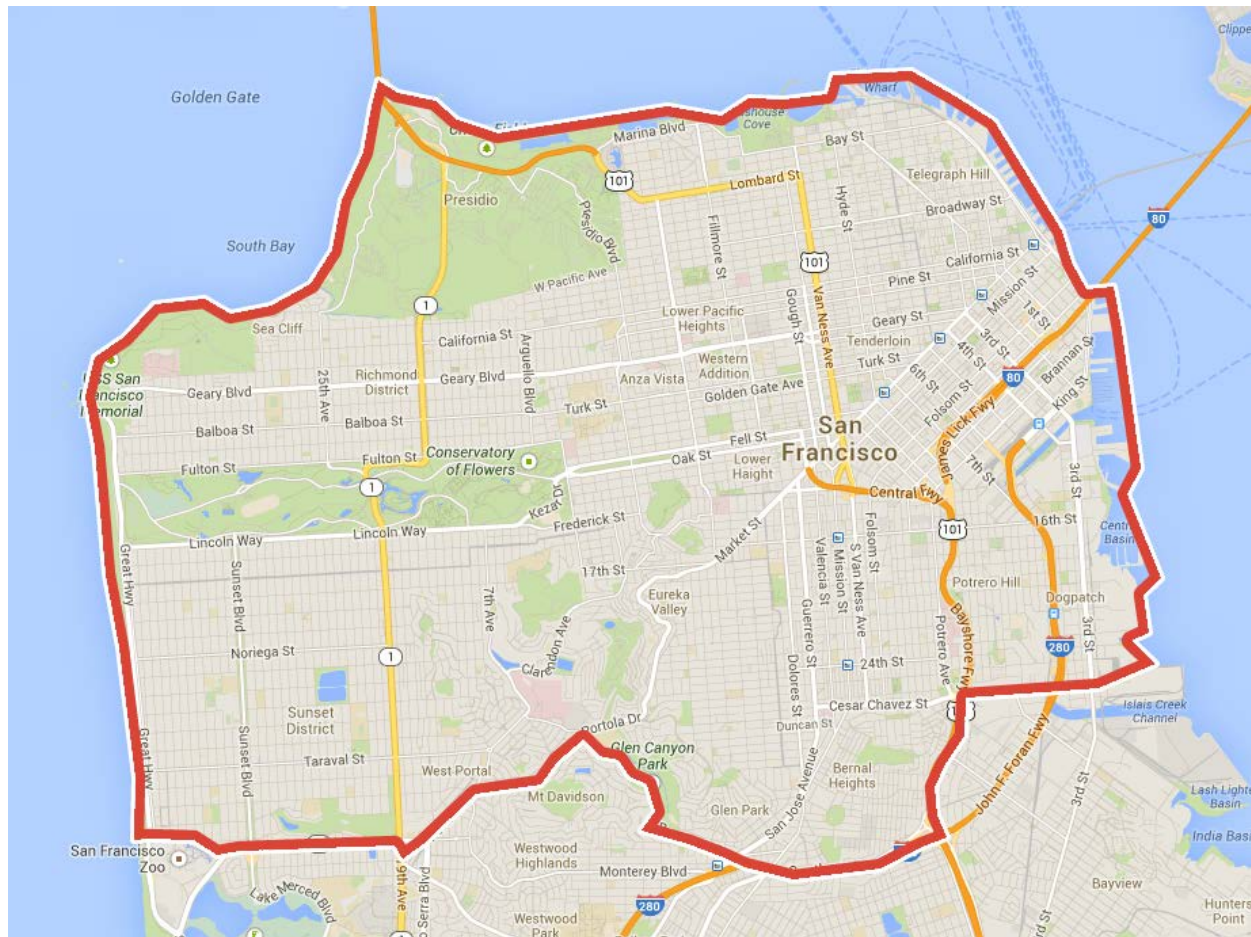
Downtown Area of Aspen, CO



Downtown Area of Boston, MA



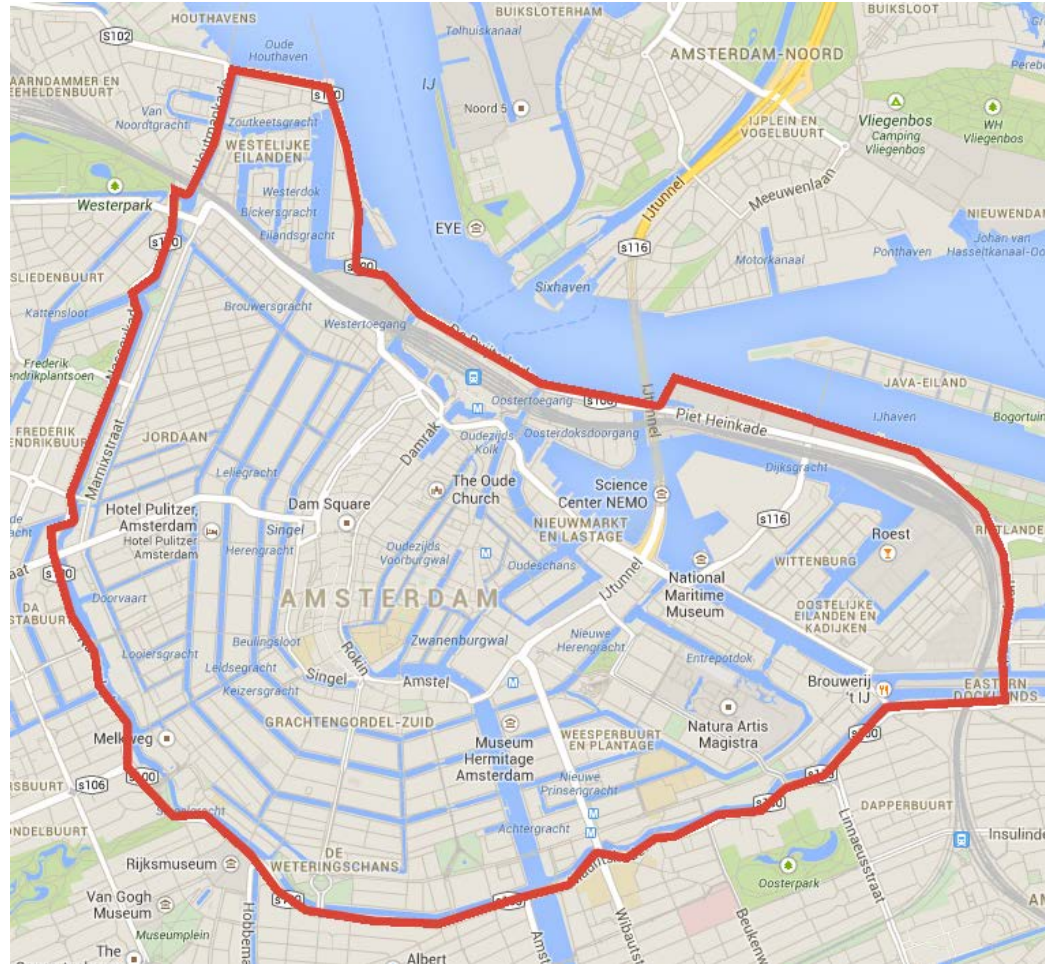
Downtown Area of New Orleans, LA



Downtown Area of San Francisco, CA



Downtown Area of Quebec City, Canada



Downtown Area of Amsterdam, the Netherlands



Downtown Area of Dublin, Ireland



Downtown Area of Malaga, Spain



Downtown Area of Salzburg, Austria



Downtown Area of Venice, Italy



Downtown Area of Hamilton, Bermuda

Restaurants and Hotels in Downtown Areas*

Country	City	Population Density	Downtown Area (Square Miles)	Downtown Population	Number of Hotels	Number of Hotel Rooms	Number of Restaurants
United States	Boston, MA	25,799	4.3	111,193	56	13,674	1,151
The Netherland	Amsterdam	24,545	3.3	81,000	188	11,495	1,156
Italy	Venice	23,077	2.6	60,000	135	5,341	596
United States	San Francisco, CA	17,474	31.4	548,682	208	33,409	4,583
United States	Boulder, CO	16,070	0.2	3,214	2	361	110
United States	New Orleans, LA	6,625	24.3	160,986	121	23,734	950
United States	Savannah, GA	6,241	4.0	24,962	32	2,887	323
United States	Charleston, SC	5,764	6.1	35,163	33	3,731	233
Bermuda	Hamilton	3,600	0.5	1,800	0	0	47
United States	Aspen, CO	1,856	3.6	6,680	22	1,280	92
Austria	Salzburg	N/A	8.0	N/A	71	4,123	302
Canada	Quebec City	N/A	2.8	N/A	58	4,268	401
Ireland	Dublin	N/A	15.9	N/A	126	11,543	1,095
Spain	Malaga	N/A	2.9	N/A	10	901	393

**The table is sorted by population density in downtown areas.*

Hotel and Restaurant Density in Downtown Areas*

Country	City	Hotel Rooms per Square Mile	Hotels Per Square Mile	Hotels Per Capita (X 1,000)	Hotel Rooms Per Capita (X 1,000)	Restaurants Per Square Mile	Restaurants Per Capita (X1,000)
The Netherland	Amsterdam	3,483.3	57.0	2.3	141.9	350.2	14.3
United States	Boston, MA	3,172.6	13.0	0.5	123.0	267.1	10.4
Italy	Venice	2,054.2	51.9	2.3	89.0	229.4	9.9
United States	Boulder, CO	1,805.0	10.0	0.6	112.3	550.0	34.2
Canada	Quebec City	1,524.3	20.7	N/A	N/A	143.2	N/A
United States	San Francisco, CA	1,064.0	6.6	0.4	60.9	146.0	8.4
United States	New Orleans, LA	976.7	5.0	0.8	147.4	39.1	5.9
Ireland	Dublin	727.3	7.9	N/A	N/A	69.0	N/A
United States	Savannah, GA	721.8	8.0	1.3	115.7	80.8	12.9
United States	Charleston, SC	611.6	5.4	0.9	106.1	38.2	6.6
Austria	Salzburg	515.4	8.9	N/A	N/A	37.8	N/A
United States	Aspen, CO	355.6	6.1	3.3	191.6	25.6	13.8
Spain	Malaga	310.7	3.4	N/A	N/A	135.4	N/A
Bermuda	Hamilton	0.0	0.0	0.0	0.0	94.0	26.1

**The table is sorted by the number of hotel rooms per square mile.*

Restaurants and Hotels in Peer Cities*

Country	City	Population Density	City Area (Square Miles)	City Population	Number of Hotels	Number of Hotel Rooms	Number of Restaurants
United States	San Francisco	17,620	46.9	825,863	222	33,816	4,741
United States	Boston	13,183	48.3	636,479	77	19,067	2,082
The Netherlands	Amsterdam	12,185	64	779,808	327	26,146	1,551
Ireland	Dublin	11,991	44	527,612	200	20,665	1,166
Austria	Salzburg	5,847	25.4	148,521	101	5,707	318
United States	Boulder	4,120	24.7	101,771	21	2,221	194
Spain	Malaga	3,670	153	561,435	46	4,402	616
Canada	Quebec City	2,947	175.3	516,625	81	5,582	610
Sweden	Göteborg	2,844	172.9	491,629	65	N/A	722
United States	New Orleans	2,045	180.6	369,250	146	25,692	1,162
United States	Aspen	1,856	3.6	6,680	24	1,486	92
Italy	Venice	1,691	160.1	270,736	190	9,739	747
Bermuda	Hamilton	1,573	2.2	3,461	4	528	47
United States	Savannah	1,377	103.2	142,022	120	11,123	594
United States	Charleston	1,152	109	125,583	51	5,428	436

*The table is sorted by population density in municipal areas.

Restaurant and Hotel Density in Peer Cities*

Country	City	Hotel Rooms per Square Mile	Hotels Per Square Mile	Hotels Per Capita (X 1,000)	Hotel Rooms Per Capita (X 1,000)	Restaurants Per Square Mile	Restaurants Per Capita (X1,000)
United States	San Francisco	721.5	4.74	0.27	40.9	101.15	5.74
Ireland	Dublin	469.7	4.55	0.38	39.2	26.51	2.21
United States	Aspen	412.8	6.67	3.59	222.5	25.56	13.77
The Netherlands	Amsterdam	408.5	5.11	0.42	33.5	24.24	1.99
United States	Boston	394.9	1.59	0.12	30.0	43.12	3.27
Bermuda	Hamilton	240.0	1.82	1.16	152.6	21.58	13.72
Austria	Salzburg	224.7	3.98	0.68	38.4	12.54	2.14
United States	New Orleans	142.3	0.81	0.40	69.6	6.44	3.15
United States	Savannah	107.8	1.16	0.84	78.3	5.76	4.18
United States	Boulder	89.9	0.85	0.21	21.8	7.85	1.91
Italy	Venice	60.8	1.19	0.70	36.0	4.67	2.76
United States	Charleston	49.8	0.47	0.41	43.2	4.00	3.47
Canada	Quebec City	31.8	0.46	0.16	10.8	3.48	1.18
Spain	Malaga	28.8	0.30	0.08	7.8	4.03	1.10
Sweden	Gothenburg	N/A	0.38	0.13	N/A	4.18	1.47

*The table is sorted by the number of hotel rooms per square mile.

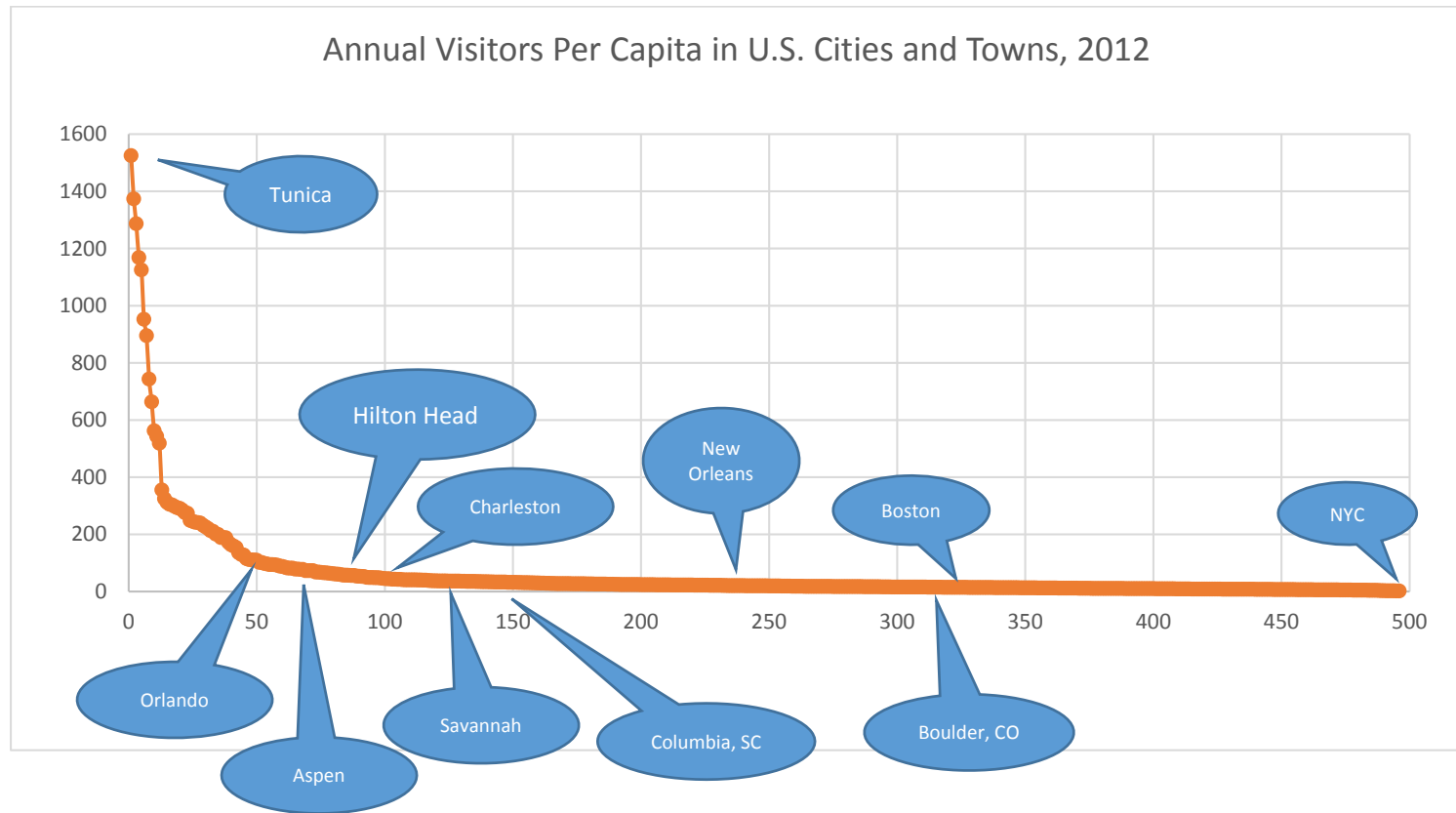
Annual Visitors Per Capita in the United States, 2012

Rank	City/Town	Visitors per Capita
1	Tunica, MS	1,525
2	Wisconsin Dells, WI	1,374
18	Myrtle Beach, SC	229
50	Orlando, FL	109
66	Aspen, CO	78
83	Hilton Head, SC	59
95	Santa Barbara, CA	49
102	Charleston, SC	44
116	Florence, SC	39
119	Ft. Lauderdale, FL	37
122	Savannah, GA	37
143	Las Vegas, NV	33
149	Columbia, SC	32
239	New Orleans, LA	20
269	San Francisco, CA	18
317	Boulder, CO	15
322	Boston	14
489	Greenville/Spartanburg, SC	3
496	New York City	2

**Peer cities and Charleston are marked in red.*

- ¹ TNS Global surveys a large sample of households in the United States for their travel experience in the past 6 months.
- ² The numbers of visitors were averaged from the person-trip estimates from TNS Global from 2011-2013.
- ³ The 2012 populations of the cities/towns were obtained from U.S. Census websites.
- ⁴ Among the 496 cities/towns in the U.S., Charleston was ranked 102nd in terms of the number of annual visitors per capita.

Ranking of Annual Visitors Per Capita in Cities/Towns in the U.S.



Conclusions

Based on an analysis of secondary data, the report showed that among all the cities in the United States, Charleston is within the top 20% of cities with a highly developed hospitality industry, when measured by visitor volume per capita.

However, compared to 14 peer historic cities around the globe, the downtown Charleston area is among the bottom half in terms of hospitality development; the City is among the bottom half when measured on a per square mile basis but among the top half when measured on a per capita basis.

When measured on a per square mile basis, downtown Charleston is ranked number 5 in the lowest hotel room density and number 3 in the lowest number of restaurants among 14 downtowns in the world; in the U.S., it is only above downtown Aspen. The downtown area is number 4 in 10 in the lowest number of hotel rooms, and number 2 in 10 in the lowest number of restaurants in the world, when measured on a per capita basis.

The City of Charleston is number 3 in 13 in the lowest number of hotels rooms, and number 2 in 14 in the lowest number of restaurants in the world, when measured on a per square mile basis. The City is actually the lowest in the U.S. in terms of hotel rooms or the number of restaurants per square mile. When measured on a per capita basis, the City is among the top half in the world: number 5 in 14 in both the number of hotel rooms and the number of restaurants. Thus, Charleston City is relatively low in tourism development spatially, but high on a per capita basis. This is due to the fact that Charleston City has the smallest population density when compared with other peer cities.

However, these numbers are based on the permanent structures (hotels and restaurants) in the City of Charleston. Many tourists stay in accommodations in adjacent cities, such as North Charleston and Mt. Pleasant, and visit Charleston during the daytime. Thus, the daily temporary tourist flow may put additional stress on the infrastructure of the City, in areas such as traffic and transportation.

In conclusion, City of Charleston is among the top 20% of tourist cities in the U.S. It is low in tourism development spatially (one of the lowest in the U.S.), but high on a per capita basis, due to a low population density. The dispersed tourist flows in the area require a more coordinated effort between different cities and counties when developing more tourism and hospitality-related infrastructure. This report also revealed a gap between the perception of the high level of tourism development and the actual data in this report. It calls for better management of the perceptions of the local community because of the highly political nature of the debate.